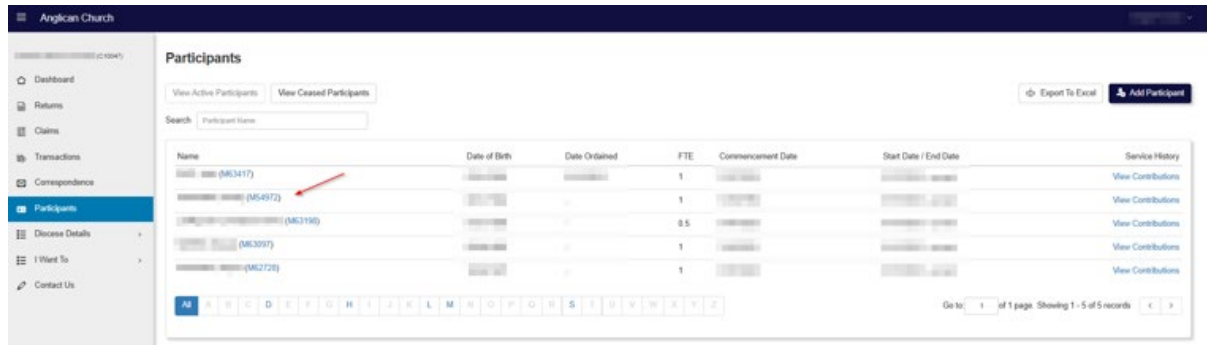


Introduction

The purpose of this document is to outline the steps required to lodge a claim from the participating organisation portal and highlight the different types of claims.

Lodging claims

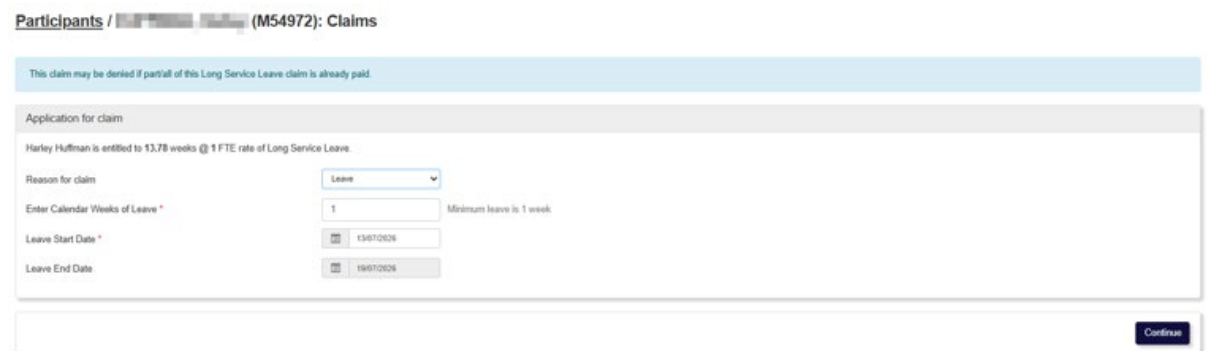
The participating organisation lodges claims for participants in the portal through the Participants tab. Select the relevant participant who is entitled to a claim by clicking the Participants tab.



After clicking into the participant, the organisation will have access to information related to the profile, contributions and benefits. This is where the organisation can create and lodge new claims for the participant.



When lodging a claim, the organisation must select the claim type: long service leave (LSL), retirement, termination or deceased. For LSL claims, the organisation must enter the number of calendar weeks the participant will claim and the leave start date. The minimum number of weeks for an LSL claim is 1 week. For retirement, termination and deceased claims, the organisation must record the relevant date.



After recording the number of leave weeks and the start date, the organisation can click Continue to calculate a claim estimate for the leave duration, split between stipend and supplementary rates. Payment details will be presented, showing where the payment will be deposited.

Your claim estimate	
1 0000 Long Service Leave weeks @ \$1,741.40	\$1,741.40
2025 Weekly Stipend Rate	
1 0000 Long Service Leave weeks @ \$1,389.31	\$1,389.31
2025 Weekly Supp. Rate	
This is an estimate only @ 1 FTE rate and does not include service via any Open Return(s).	
Total Gross	\$3,130.71
Total Net	\$3,130.71

Payment Details	
Account Name *	Formation Technology
BSB Number *	933900
Account Number *	000000000

Finally, the organisation can upload supporting documents on behalf of the participant. The supporting documents should include the listed information for the fund to review and approve the claim. Once the file has been uploaded, the organisation can click Submit to lodge the claim.

Supporting Documents			
To help us process your claim, please upload (optional): - A letter of leave application The following information can be in the letter: - Letter must be in Diocese Letter Head. - Signed by the appropriate officer - Full name of the participant. - Period of leave which should be in weeks (7 days) - A start date and End date of the leave period (leave claim) - Last working day (Resignation/Termination date, Deceased date etc) You may use your smart phone to take a photo of these documents, or your computer to upload a scanned copy of these documents.			
Document	FileType	Uploaded	Action
No documents found. Click browse/upload to upload documents.			
File Upload: Other		No file selected	Browse 1 Upload 2
Terms and Conditions ☒ I attest that this claim application has been approved in accordance with the procedures of the Diocese or Participating Organisation.			
3		Delete Save As Draft Submit 4	